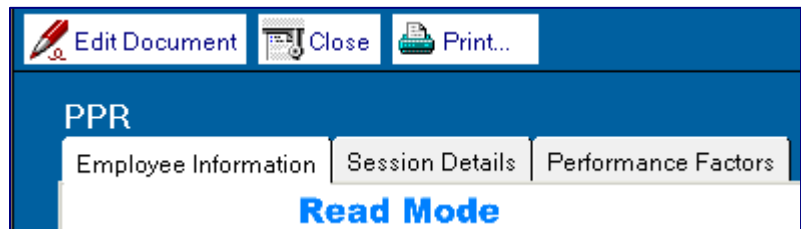## About the Human Resources Forms Application

Human Resources Forms is a Notes based application that provides on-line forms and procedures for creating commonly used Human Resources documents. This Notes version offers an alternative to other electronic means in two areas. First, the application contains special Notes input forms designed for easy use. A custom print process generates the standard form paper documents. Second, while you can save, edit and copy Notes documents like word processor documents, you can also restrict read/edit access to these documents on an individual document basis.

Human Resources Forms is for use statewide. Any person with a Notes ID can create/edit documents with this application. Viewing and editing of saved documents is restricted to the author of the document and any individuals s/he specifically lists as authorized readers.

General Document Format

This application provides special Notes input forms for each document type. These input forms look different from the printed document versions. Their design emphasizes easy use, with helpful instructions, data entry shortcuts, and custom action buttons. One such action button is the specialized 'Print'. This button does not print what is visible on the screen, but generates the familiar looking paper document.

The print programming uses MSWord templates to produce the paper documents.

Information keyed into a Notes input form and saved, creates a document. This document is stored in the database. Similar to a word processor document, you can revise and reprint a document if necessary. You can also copy the contents of an existing document as a quick way to create a new one. For example, you can copy a PPR Planning Session document (with the expectations filled in), add performance comments to it, and create the PPR Review Session document.

Locating and Book marking the Notes "Human Resources Forms" Database

First Time Access - The Human Resources Forms Database is located on a networked Notes/Domino server. The name of this server is "Notes1/ladotd/us". Follow these instructions to open the database for the first time. After this initial setup, the database is book marked on your Notes desktop, so this procedure is no longer necessary.

- Open Notes

- From the Command Ribbon at the top of the Notes workspace, select File, then Database, then Open…

- In the "Open Database" box, under "Server:", change the 'Server' from "Local" to "notes1/ladotd/us". Rather than typing, use the shortcut arrow to the right of the field to get a listing of databases. Select "notes1/ladotd/us" from this list. Note: You may not see a listing for "notes1/ladotd/us". If not, select "Other", "notes1/ladotd/us" will then appear for selection.

- Scroll through the list under "Database:" and select "Human Resources Forms"

- Click the "Open" button in the top right corner of the "Open Database" box
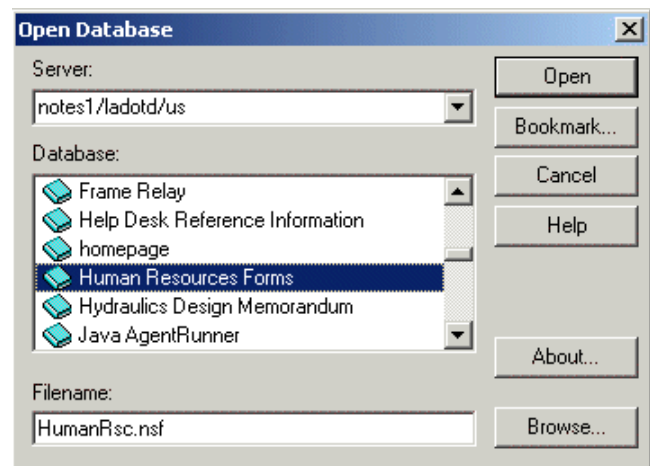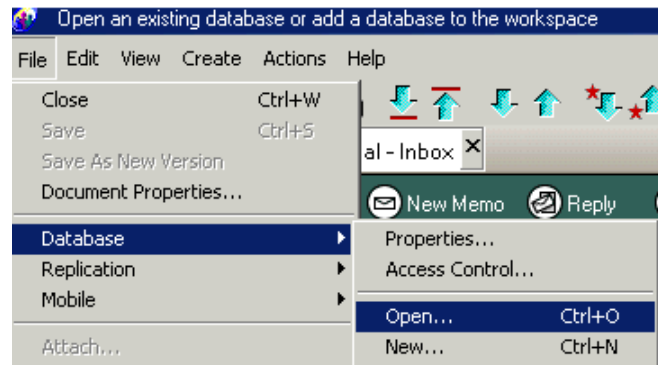
Note: Occasionally, database programming changes cause a large dialog box to appear proclaiming you are about to execute a function you are not authorized to perform. This is not common, but it does occur. The box prompts you to select one of four options. Select "Trust Signer". You must select "Trust Signer" in order to access the database. By selecting "Trust Signer", you are telling Notes you trust the application programmer to perform hidden functions that you, as a user, are not allowed to do directly (like access the stored MSWORD templates for printing). You may receive more than one of these boxes. Select "Trust Signer" each time.

Accessing "Human Resources Forms" after the initial setup

- Click the "Databases" icon on the tool menu located along the left side of the Notes workspace

- Find the entry "Human Resources Forms" and click to open the application

Accessing "Performance Planning and Review Forms and Documents"

Forms and views necessary for creating and accessing these documents are available from the "Human Resources Forms" application 'Home' page. This Home page is divided into two sections. The left portion displays a navigational outline. "PPR" is currently the first listing in the menu.

The navigational outline is a tree structure, meaning additional options may be located beneath some listings. A colored square or diamond to the left of an entry is an indication of this hidden information. Clicking on any entry with a square or diamond will cause the hidden options to reveal themselves. Click once more on the entry to hide these options again.

Located under the PPR entry is a "Create New Document" action. Clicking this action brings up an option to select the appropriate Notes input form.

Note: When you attempt to create a PPR document, you will receive messages telling you the database is 'under construction' and to 'proceed at your own risk'. These messages will remain in place until such time as the Human Resources section approves all aspects of the newly revised Civil Service SF15 PPR forms. Simply ignore these messages and continue.

Also located under each document type entry is a "View Existing Documents" heading. The database contains views that list saved Notes PPR documents. These views are similar to the ones found in your mailbox (inbox, sent, all documents, etc.). You access existing documents from here.

All views are Categorized views. Small colored triangles pointing to the right indicate more categories or the actual documents hide beneath. When a triangle is pointing down, this indicates whatever normally hides beneath the category is now visible. Click a triangle to expand a category and reveal the hidden information. Click the triangle again to reverse the action.

A listing without a triangle beside it is an actual existing document. You can open documents from here for editing, printing or copying.